

RECORDS RETENTION AND DISPOSAL SCHEDULE

C-727
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No.

Agency St. Mary's County - Procurement Office		Division
Item No.	Description	Retention
1.	<u>Purchase Order/Contracts file</u> Files containing copies of specifications, bids, correspondence and invoices for materials or construction ordered by county offices. Purchase orders are used for items under \$5000, contracts for over \$5000.	Retain 3 years after the contract/purchase order is completed or until all audits are completed, whichever is later, then destroy

Schedule approved by Department, Agency, or Division Representative

Schedule authorized by

Jan Blodgett
Signature Title Date
Procurement Office 3/30/94

Jan Blodgett
County Archivist
Ida...
State Archivist
4/4/94
Date
4/15/94
Date

RECORDS INVENTORY WORKSHEET

1) Department Procurement		Division		Section	
2) Name & title of person responsible for records James P. Haley			Office secretary/clerk		
3) Records series title Purchase Order/Contracts File			4) Earliest date/Latest date 1982-1994		
5) Description of record series (Content, purpose, who creates, form numbers, etc.) P.O. and Contract files contain copies of bids, correspondence, specifications, and invoices for items or work ordered by county offices. Purchase orders are for costs of under \$5000; contracts for those over \$5000. Files are numbered sequentially.					
6) Location of records Procurement office			7) Conditions of storage area (Security, environment, fireproof) ___ Good <input checked="" type="checkbox"/> Fair ___ Poor		
8) Volume 30 cu.ft.		9) Records still being created? <input checked="" type="checkbox"/> Yes ___ No		10) Annual accumulation 10 cu.ft.	
11) Records series characteristics TYPE: <input checked="" type="checkbox"/> Paper ___ Card ___ Bound Volume ___ Microfilm ___ Audiotape ___ Videotape ___ Machine Readable ___ Other(specify) _____ SIZE: <input checked="" type="checkbox"/> Letter <input checked="" type="checkbox"/> Legal ___ Other (specify) _____ STATUS: <input checked="" type="checkbox"/> Original ___ Copy ARRANGE- MENT: <input checked="" type="checkbox"/> Chronological ___ Alphabetical by _____ Numerical by _____ ___ Geographical ___ Other(specify) _____					
12) Are records indexed? ___ Yes <input checked="" type="checkbox"/> No If yes, identify _____					
13) Reference frequency (check, insert numbers, circle appropriate words) ___ 2 times, daily, weekly, monthly, annually for 12 months, years ___ Never after _____					
14) Information available elsewhere? <input checked="" type="checkbox"/> Yes ___ No If yes, where specifications on diskettes			15) Microfilmed ___ Yes <input checked="" type="checkbox"/> No		
16) Conditions of records <input checked="" type="checkbox"/> Good ___ Fair ___ Poor			17) How stored? <input checked="" type="checkbox"/> Filing cabinets ___ Shelves <input checked="" type="checkbox"/> Boxes		
18) Any known requirements for retention? (statutes, etc.)			19) Audit requirements? ___ None <input checked="" type="checkbox"/> State <input checked="" type="checkbox"/> Federal <input checked="" type="checkbox"/> Independent		
20) Access restrictions? ___ Yes <input checked="" type="checkbox"/> No Explain (cite laws or regulations): except in cases of proprietary information in bids					
21) Recommended retention Retain 3 years after contract/purchase order agreement is completed or until all audits are completed, whichever is later, then destroy.					
23) Department Head / Date Jim P. Haley 3/30/94			22) Prepared by/date Jan Blodgett 3/29/94		
			24) Archivist / Date Jan Blodgett 3/29/94		